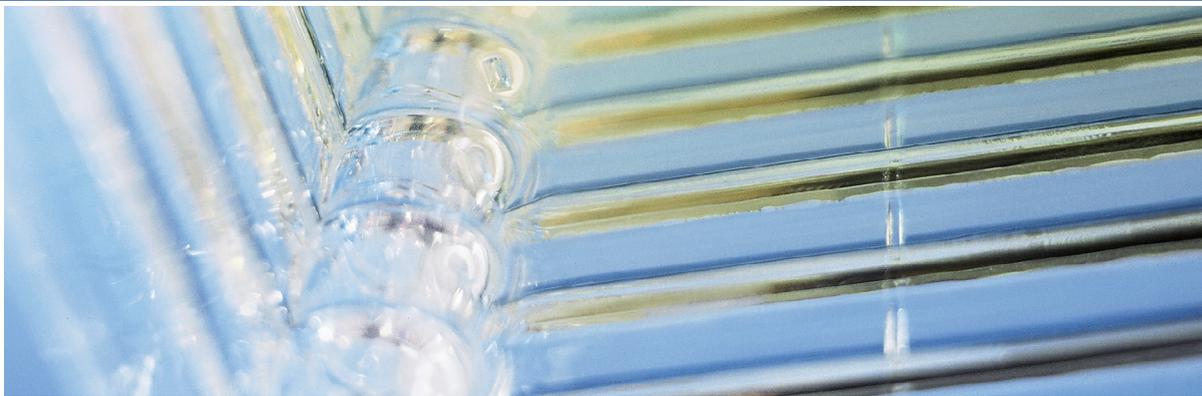
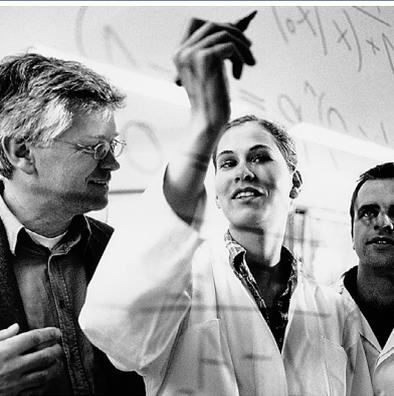


Harnessing and realizing synergies:
Cooperations between biotechnology and
medical technology companies



**Harnessing and realizing synergies:
Cooperations between biotechnology and
medical technology companies**

Contents

Foreword	1
Introduction	2
Survey	6
Workshops	18
Public debate	21
Summary	22
End notes	23
Imprint	24

Marc Reinhardt
Capgemini Deutschland

Since 1995, much discussion and a great deal of attention have been devoted to Germany's drive to catch up in the field of biotechnology. The nation now not only boasts a large number of companies in this sector, but also increasing substance in terms of employee numbers, turnover and clinical projects.

On the other hand, Germany has long been one of the world's top performers when it comes to the field of medical technology. It is involved in a wide range of activities in the various industry segments, producing everything from simple top-quality products to large, highly innovative and technically complex pieces of equipment.

However, both sectors face their own set of challenges. Biotechnology needs to become self-supporting in terms of turnover and profit as soon as possible and medical technology must be prepared for a radical change in treatment strategies resulting from medical innovations.

The innovations that could be made possible by combining biology, medicine and physics are an extremely exciting prospect.

Dr. Klaus Eichenberg
BioRegio STERN

The aim of this new survey into biotech and medtech companies by BioRegio STERN Management GmbH is to give new impetus to discussions and to promote initiatives for successful cooperation between the two.

BioRegion STERN and surroundings is in an ideal location for this. Nearly 350 medical technology businesses – the global players in the industry and many of their suppliers – are based in the region and include highly innovative SMEs (small and medium-sized enterprises). Their products, for example in the field of minimally invasive medicine, attract international attention. Close to 100 biotechnology businesses are already successful in the region.

In future, both sectors will need to re-think the assumed dividing line between them. Everyone will benefit from successful cooperation between the two industries, especially those companies which will as a result keep and further strengthen their competitiveness on a world-wide scale.

Together we will harness synergies and think business forward.

Foreword

Introduction

A comparison between the biotechnology and medical technology industries reveals a number of perhaps unexpected similarities.

Measuring in terms of key figures such as workforce and turnover, both sectors are dominated by SMEs, with only a very limited number of big players. In 2002, 93% of medtech companies had fewer than 100 employees. Only 1.2% of these businesses fell into the large enterprise category with 500 or more staff¹. Germany's biotech industry too consists mainly of small companies, 88% having fewer than 50 staff and only 1.1% a workforce in excess of 250.

Both industries are highly innovative, placing great emphasis on research and development. The German medical technology sector's R&D rate – that is to say the proportion of total turnover spent on research and development – is either 6.8%² or 8%¹ according to two different sources. This percentage is approximately twice the figure for the processing industry as a whole, where the R&D rate is around 3.8%³. The high level of R&D spending in the biotechnology sector is particularly striking. In 2005, which saw an industry-wide turnover of €1.5 billion, it amounted to some €714 million⁴.

One key distinction between the two industries is their degrees of maturity. Medical technology is an established industry with roots dating back in part to the 19th century⁵. In 2005, the 1,236 companies located in Germany in this sector and classified as part of the manufacturing industry employed a total workforce of 87,600². Turnover in 2005 amounted to €5.5 billion within Germany and €9.2 billion in other countries. By contrast, biotechnology businesses have, on average, been in existence for 6.9 years. Slightly fewer than 50% pre-date the Millennium and only 19% date back further than 1995. There are currently 480 biotech companies in Germany⁴ and in 2005 their joint workforce of 12,973 generated a turnover of €1.5 billion.

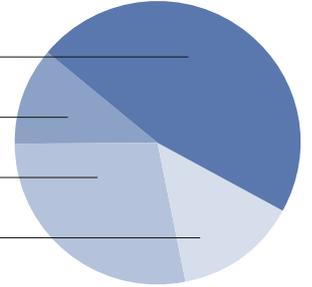
The two industries' disparate histories also result in different strategic approaches. Whereas most biotech companies focus on research, medical technology businesses are market-oriented. Many biotechnology products have not yet made it to the end-consumer stage (health insurance companies and patients) but are competing, mostly with pharmaceutical companies, for licences in the market of pharmaceuticals in preclinical or clinical development.

The logical consequence of this is that leading pharmaceutical industry representatives are now talking of an artificial, notional separation between the biotechnology and pharmaceutical industries which will disappear in future. As a result, the pharmaceutical sector is also the main focus of biotech companies' cooperation plans (Fig. 1b). The situation is quite different in the medical technology industry with its traditional cross-sectional technology. Here, innovative capability depends on the skillful integration of various basic and key technologies. The medical technology sector now believes that biotechnologies have a crucial role to play in its industry.

Fig. 1a: Distribution of planned cooperation between medtech companies and other sectors in percent

Medtech companies

Biotechnology	47%
Medical technology	11%
Pharmaceuticals	28%
Public institutions*	14%



Biotech companies

Biotechnology	26%
Medical technology	26%
Pharmaceuticals	43%
Public institutions*	5%

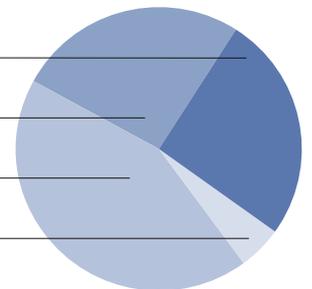


Fig. 1b: Distribution of planned cooperation between biotech companies and other sectors in percent

* Universities and state-funded research and development institutions

Fig. 2a: Distribution of current cooperation between medtech companies and other sectors in percent

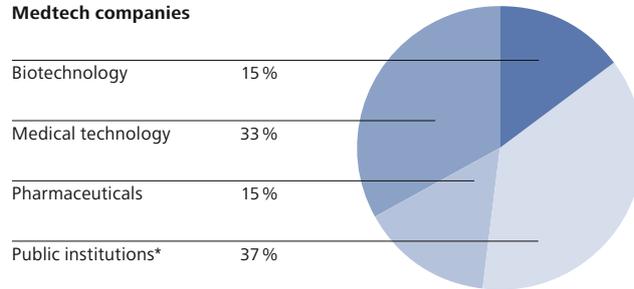
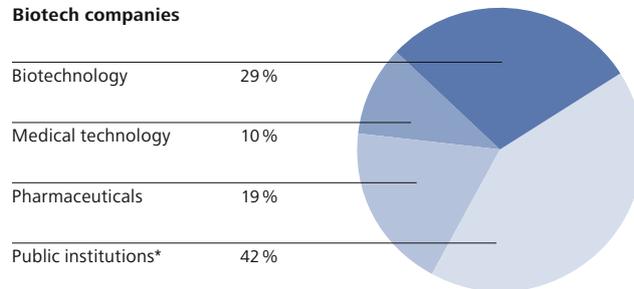


Fig. 2b: Distribution of current cooperation between biotech companies and other sectors in percent



* Universities and state-funded research and development institutions

Material sciences – research work on biomaterials and biotechnology/cell technology, for instance – have been identified as important key technologies for the medical technology sector and increasing significance is being attached to them⁶. Successful examples such as drug-eluting stents already demonstrate the importance of biotechnologies in the medtech industry. This success story would not have been possible without research into cellular and molecular biology. In the U.S. alone, an average annual market growth of 28% is now being forecast for this sector, which is expected to generate close to \$ 11 billion by 2011⁷.

The question for the medical technology industry is how to access new technologies, in particular biotechnologies. The options range from developing its own know-how and skills through cooperation arrangements to the complete buyout of appropriate companies. Siemens has already adopted the latter approach.

In 2006, it acquired Bayer's Diagnostics Division and Diagnostic Products Inc. for a total of €5.7 billion, catapulting it into the number two slot in the global market for immune diagnostics in a matter of weeks. Such strategies are not usually an option for the medical technology industry, dominated as it is by SMEs with insufficient financial resources for an investment of this magnitude. For such businesses, cooperation arrangements are a better way of utilizing new technologies. Consequently, it is only logical that the medical technology industry identified biotechnology as the main focus of its cooperation plans (Fig. 1a).

The objective must be to stimulate and encourage cooperation between the two sectors. With this in mind, several events have been held and this study was commissioned. The results of the study, as presented in this document, represent an initial step towards creating an understanding of the similarities and differences between the two industries, identifying potential obstacles and stumbling blocks that may hinder cooperation and discussing possible solutions.

Survey

In November and December 2005, a survey was carried out in German-speaking countries to analyze the attitude of medtech and biotech companies towards cooperation and identify possible areas of cooperation between the two sectors.

Basis of survey

A total of 1,395 businesses were asked to participate in the survey, 38% of them biotech companies and 62% medtech companies.

Some 141 businesses (10.1%) actually took part, 51% classifying themselves as biotechnology companies and 49% as medical technology companies. A breakdown of the survey participants reveals that businesses from all the various medical product segments were represented. The proportion of participants from the diagnostics and imaging sectors was just as high as for a medical technology study carried out last year by DIW Berlin (the German Institute

for Economic Research)⁸, but more companies from the cell and tissue engineering sector took part in this study and fewer from the field of physiotherapy/rehabilitation. This is no doubt due to the different subjects tackled by the two surveys.

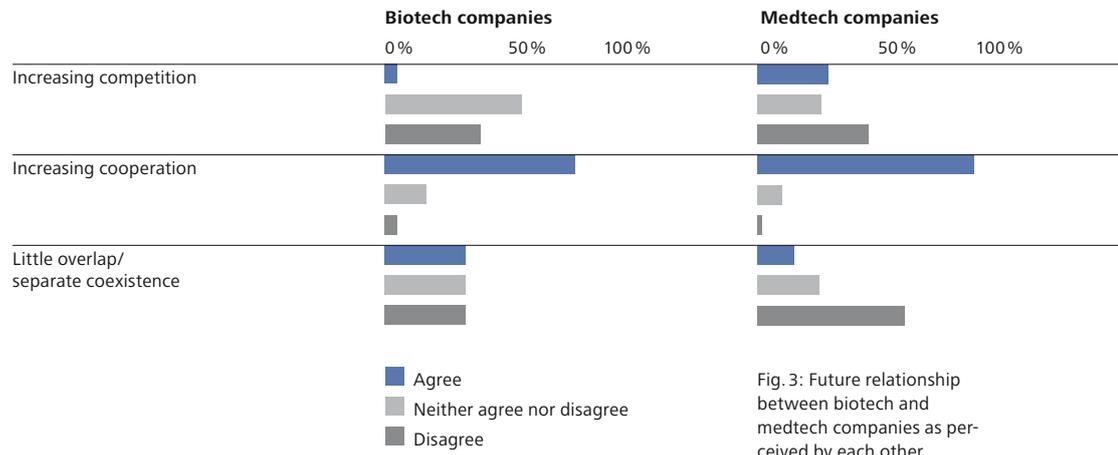


Fig. 3: Future relationship between biotech and medtech companies as perceived by each other

Cooperation status

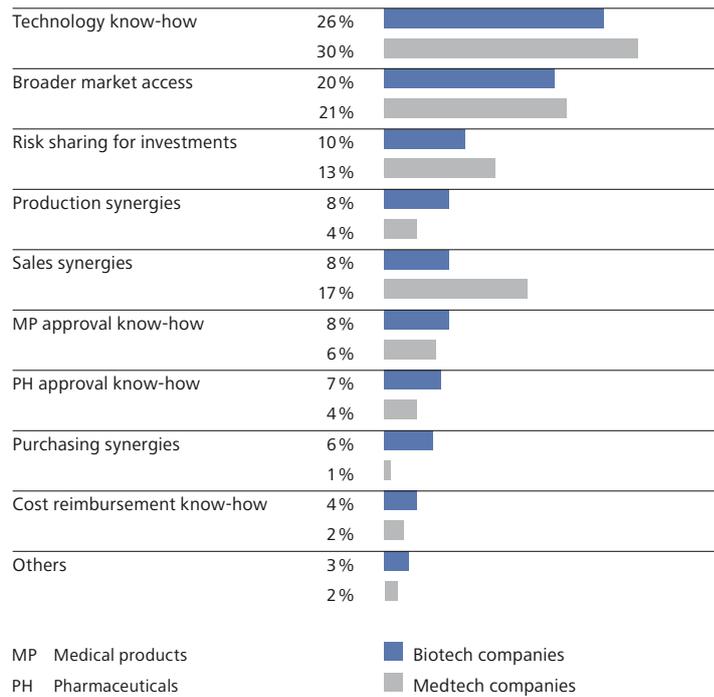
If companies offering new technologies gain a foothold in established sectors, this can result in competition, cooperation or coexistence. The survey revealed in a barometer of public opinion that representatives of both industries anticipate increased cooperation between the two over the coming years (Fig. 3). Fewer businesses are thinking in terms of competition or coexistence, demonstrating the will to join forces.

At the present time, both industries tend to cooperate most regularly with public institutions and within their own sector

(Fig. 2a, Fig. 2b). In future, however, a significant shift to other sectors is expected, largely to the detriment of cooperation arrangements with public institutions. Biotech and medtech companies expect the highest percentage increase in cooperation arrangements with each other (Fig. 1a, Fig. 1b).

The assumption that small, innovative biotechnology companies are more likely to look for cooperation arrangements with medical technology companies was refuted by the survey. In actual fact, medtech businesses show greater interest in cooperation and biotech businesses are top of their list of potential cooperation partners. By contrast, biotech companies are more interested in cooperating with the pharmaceutical industry. An analysis of the medical technology companies open to the idea of cooperation reveals that 41% of them already use biotechnologies in their own operations.

Fig. 4: Reasons for cooperation between biotech and medtech companies



This figure is just 13 % for those reluctant to enter into cooperation agreements. Some 70 % of medtech companies currently cooperating with biotech businesses already use biotechnology in their own operations. This seems to indicate that having personal experience of biotechnologies is an important factor in increasing companies' readiness to consider cooperation.

The three main reasons for working with companies from the other industry are increasing technology know-how, broadening market access and risk sharing for investments (Fig. 4). Expertise in obtaining market approval for medical products (MP) or pharmaceuticals (PH) was regarded as less important. This demonstrates the strong interest in the technologies of the other sector and the perceived necessity of getting to grips with such technologies.

Current and future areas of cooperation

42 % of the medical technology businesses taking part in the survey already work with biotechnologies. The technologies most frequently used are microarrays, biosensors and recombinant proteins (Fig. 5). The most common activity among medtech companies already using biotechnologies in their own operations is the production of in vitro diagnostics and implants (Fig. 6).

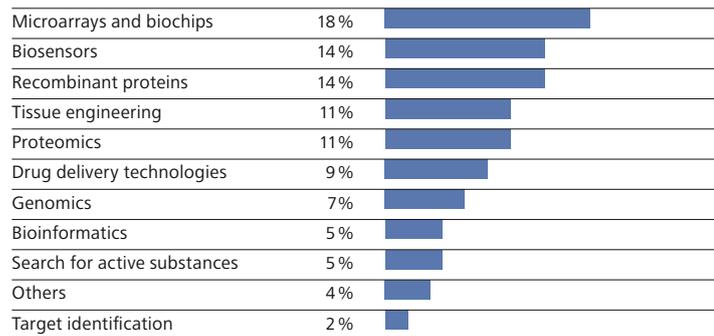


Fig. 5: Biotechnologies already used by medtech companies

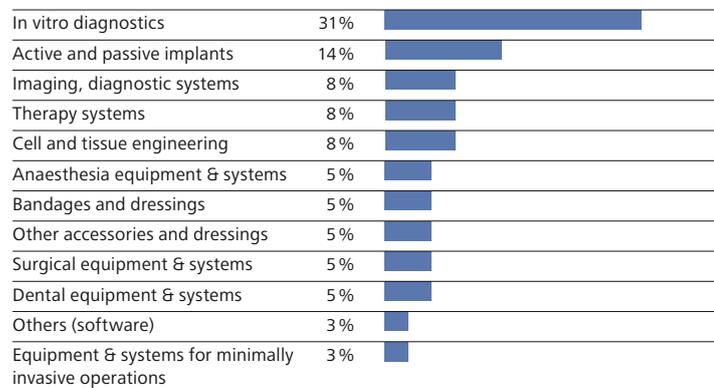


Fig. 6: Areas of business in which biotechnologies are used by medtech companies, based on the 42% of medtech companies questioned already working with biotechnologies

However, businesses from the vast majority of medical product segments are also represented. The companies not using biotechnologies in their own operations mostly come from the segment manufacturing either equipment and systems for surgery or surgical equipment and systems for minimally invasive operations. These findings demonstrate that biotechnologies are already used in virtually all areas of the medical technology sector, albeit it to different extents.

Fig. 7: Use of biotechnologies by medtech companies according to turnover

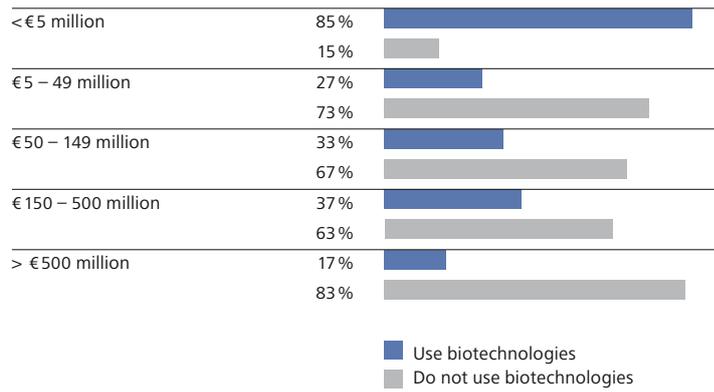
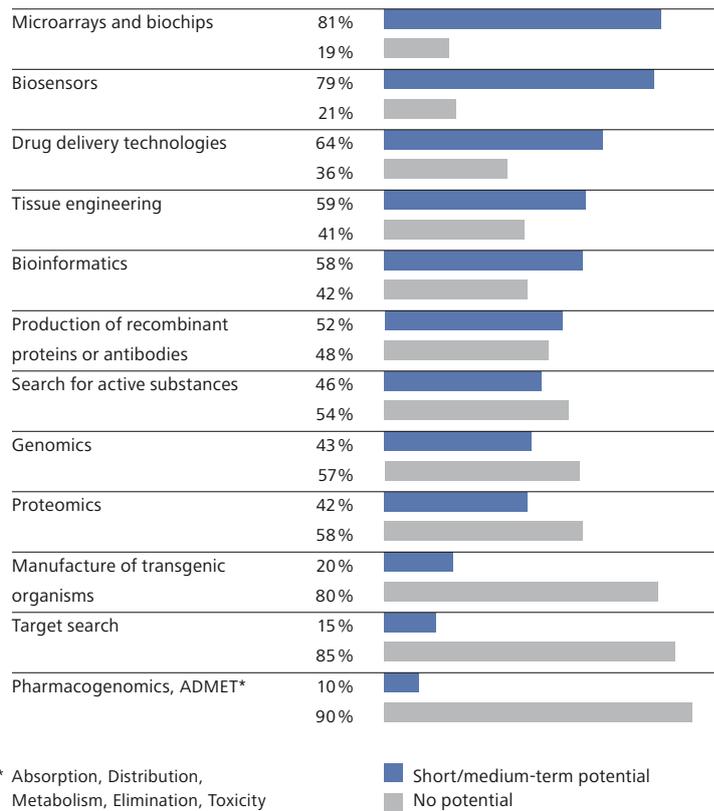
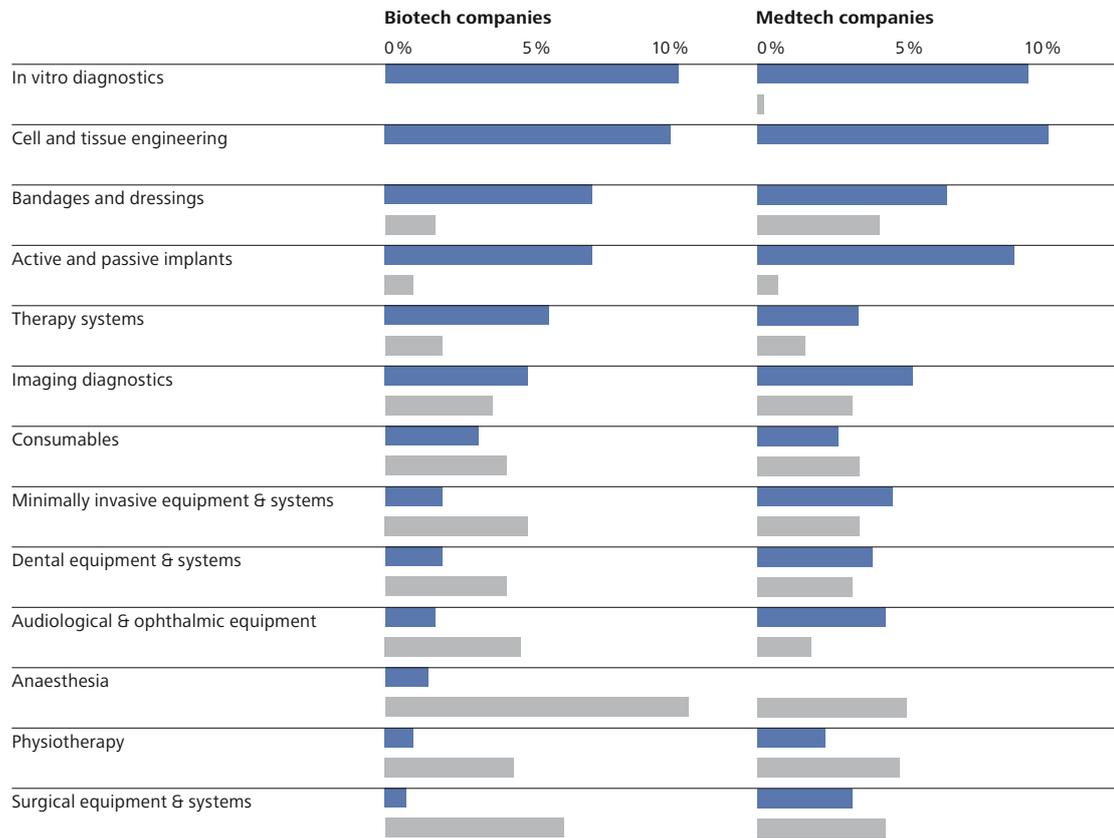


Fig. 8: Potential for biotechnologies at medtech companies



One of the study's most striking findings is that the proportion of medtech businesses using biotechnologies is by far the greatest (85%) for small companies with a turnover of less than €5 million and lowest for companies with a turnover in excess of €500 million (Fig. 7).

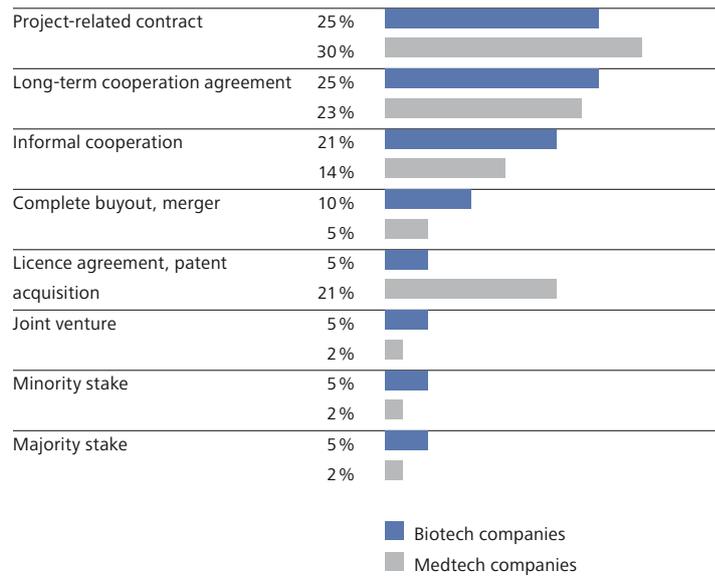


In the opinion of medical technology businesses, microarrays, biosensors and drug delivery technologies offer the greatest future potential for utilizing biotechnology in their own operations (Fig. 8) and their use will increase in coming years. Companies from all the various medical product segments see potential for these technologies in their own operations.

The fields where biotechnologies are predicted to have the greatest influence are in vitro diagnostics, cell/tissue engineering and bandages/dressings (Fig. 9). Comparing the potential for biotechnologies described above with their influence in the various fields, the use of microarrays for in vitro diagnostics and the use of tissue engineering in combination with cell and tissue technologies seem to fit perfectly.

Fig. 9: Future importance of biotechnologies for various medical product segments as perceived by biotech and medtech companies

Fig. 10: Forms of cooperation between biotech and medtech companies as rated by each



Current forms of cooperation and their success factors

Both industries also see great potential for bandages and dressings. For example, combining biomaterials with laboratory-grown cells can give a dressing new properties and coating implants with molecules or cells is a method already used to enhance their properties. In the field of imaging diagnostics too, newly identified molecular markers will increasingly be used in future to track the progression of illnesses and diseases in vivo.

Both industries would prefer future cooperation to competition. They also have very clear ideas on which biotechnologies will be important for medical technology companies in the future.

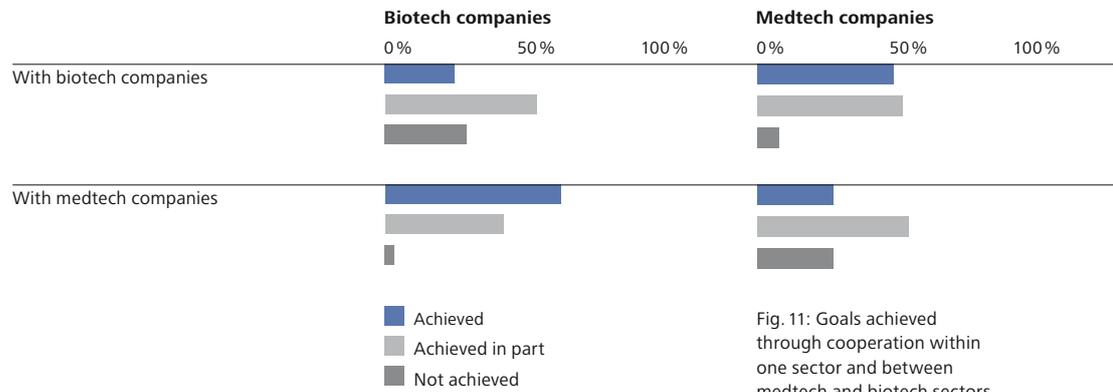


Fig. 11: Goals achieved through cooperation within one sector and between medtech and biotech sectors

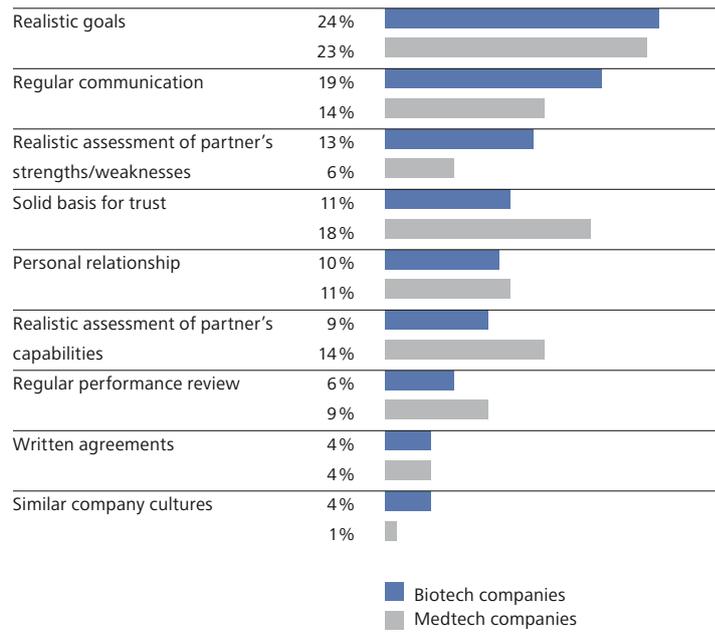
This was not, however, a widespread practice among the biotechnology businesses participating in the survey, presumably due to the two sectors' different degrees of maturity.

The existing cooperation between medical technology and biotechnology businesses is mainly based on project-related or long-term cooperation agreements (Fig. 10). The medtech companies participating in the survey had often concluded licence agreements and patent acquisition agreements with biotech companies.

Cooperation between the two industries succeeded more often than such arrangements did within the respective sectors (Fig. 11). Although medical technology businesses are more interested in cooperation, biotechnology companies rate such arrangements more positively.

Medtech companies working in the field of in vitro diagnostics are most happy with their cooperation arrangements with biotech companies. This is also the group in which the highest number already use biotechnologies in their own operations. Obviously, a certain level of personal experience helps a company to make a realistic appraisal of its prospects and structure cooperation in a way which will prove successful.

Fig. 12: Factors ensuring successful cooperation as rated by biotech and medtech companies



Having realistic goals and communicating regularly were named as the two most important factors for successful cooperation (Fig. 12).

Companies often cited an unclear patent situation, a cooperation partner's lack of R&D professionalism and concerns over the loss of a technological edge as reasons for the failure of cooperation arrangements (Fig. 13).

However, given that one of the main reasons for working together is increasing technology know-how (Fig. 4), the simultaneous concern over a company losing its technological edge (Fig. 13) represents a contradiction. Written agreements alone are perhaps not the only answer in such cases. Emphasis should be placed on building up a joint basis for trust.

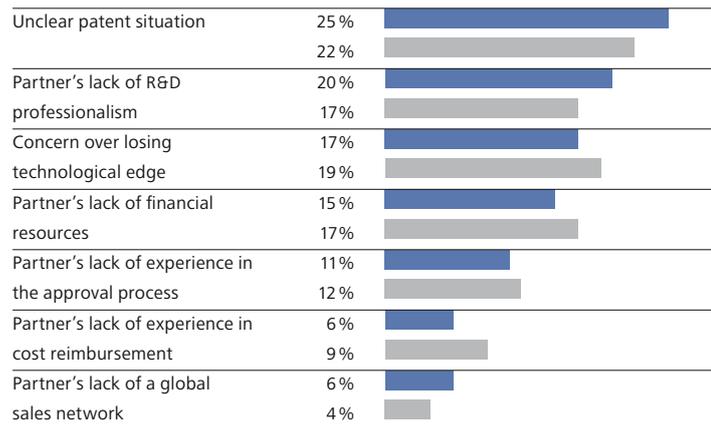


Fig. 13: Reasons for the failure of cooperation arrangements as rated by biotech and medtech companies

■ Biotech companies
■ Medtech companies

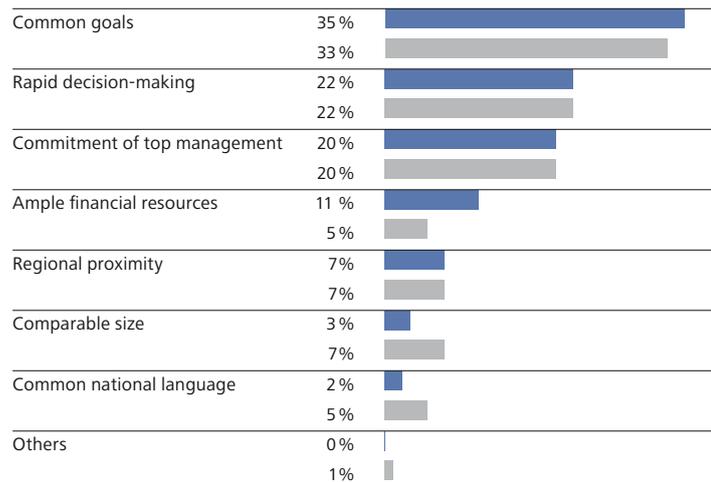
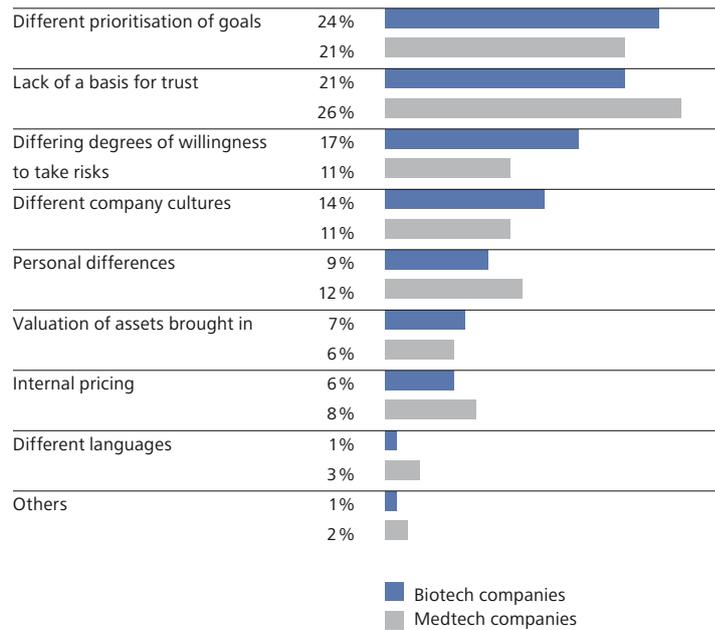


Fig. 14: Success factors when initiating cooperation arrangements as rated by biotech and medtech companies

■ Biotech companies
■ Medtech companies

Fig. 15: Obstacles encountered when initiating cooperation arrangements as perceived by biotech and medtech companies



How to go about looking for a partner

Both sectors concur that key factors for successful cooperation are common goals, rapid decision-making and the commitment of top management (Fig. 14). The way negotiations are handled is clearly more important than more concrete factors because regional proximity, ample financial resources and a comparable company size scored less highly.

The involvement of top management is important in order to be able to make quick decisions when concluding the agreement and to demonstrate the high regard in which the cooperation partner is held.

The fact that medical technology businesses did not consider a biotech company's financial resources to be an important factor for cooperation could very well have something to do with the assumed limited financial strength of the biotechnology sector as a whole.

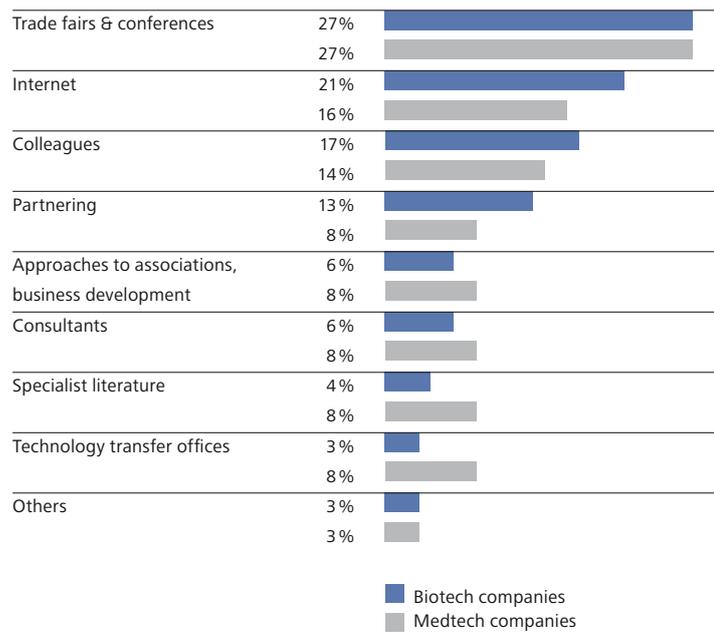


Fig. 16: Measures facilitating cooperation as perceived by biotech and medtech companies

The greatest obstacles encountered when initiating cooperation arrangements were considered to be different goals and the lack of a basis for trust (Fig. 15). Here too, more concrete factors such as the valuation of assets brought into the partnership or internal pricing were deemed less important.

Currently, the most common methods used to identify potential partners are trade fairs and conferences, the Internet and consulting colleagues (Fig. 16). When asked their preferred measures for improving the opportunities for cooperation, one additional popular response was inviting applications for interdisciplinary funding.

Workshops 1

In May 2006, an event entitled "Harnessing synergies – medtech and biotech" was held in Tübingen at the invitation of BioRegio STERN. Four workshops took an in-depth look at issues which the survey deemed to be of particular interest in the context of cooperation arrangements – "R&D strategies in medtech and biotech companies", "Pharmaceutical or medical product?", "Future teamwork products" and "Finding the right partner". The results were analyzed in a subsequent panel discussion.

R&D strategies in medtech and biotech companies

Major differences exist between the R&D strategies of medical technology and biotechnology companies in terms of willingness to take risks, innovation levels and the developmental maturity of projects considered for cooperation arrangements.

2

Pharmaceutical or medical product?

Whether a product is classified as pharmaceutical or medical depends on its main effect. Preference should be given to classification as a medical product, if possible, as the approval process is simpler and less expensive. There are often problems obtaining approval for products combining biotechnology and medical technology. The non-uniform federal system in Germany complicates matters because products can be assessed differently by various licensing authorities.

3

Future teamwork products

Different ways of thinking and disparate company cultures result in comprehension problems. Cooperation arrangements do require a concrete picture of the joint product, but in most cases this focus on a finished product can hamper the creative process incorporating unknowns such as the potential partner's skills or ideas that could result in leap innovations.

4

Finding the right partner

Networks make it easier to find the right partner but their increasing number means that they also need to be coordinated. Despite the information available, a reliable assessment of the opportunities and risks of a cooperation arrangement is difficult and remains dependent on building up a personal relationship of trust. The companies' different ways of thinking make it more difficult to initiate cooperation.

Medical technology position

- Focus on further development and ongoing improvement of their products
- Development periods of two to three years, resulting in lower investments and a reduced risk overall, including less risk of a delay in obtaining market approval
- Targeted product planning – mass production, patent environment, size of market, approval process, reimbursement of costs

Biotechnology position

- Development direct from the research stage
- New products and technologies often leap innovations
- Product development periods of up to twelve years, requiring major investments

Medical technology position

- Approval based on the MPG (German law on medical products) in most cases for products with a physical action whose approval is often more straightforward to obtain than for a pharmaceutical

Biotechnology position

- Approval based on the AMG (German Drug Law) in most cases for biological/chemical products whose effect has to be proven through costly and time-consuming clinical studies

Medical technology position

- Well-established, fixed company structure
- Engineering science the predominant force in product development

Biotechnology position

- Innovative, unconventional company culture
- Natural science the predominant force in product development

Medical technology position

- Traditional company structures, often family businesses
- Product's commercial potential the main focus

Biotechnology position

- Unconventional, young founders of new businesses
- Focus on what is technically feasible rather than commercial potential

Workshop recommendations

1

R&D strategies in medtech and biotech companies

In order for biotech companies to initiate cooperation arrangements with medtech businesses, their technologies should be sufficiently developed for a concrete product to be within sight and they should already have a clear picture of how to structure the cooperation to ensure its success.

2

Pharmaceutical or medical product?

Each sector must develop an understanding of the rules governing the other sector. In order for cooperation to be successful, it is important to decide at an early stage whether the new product to be developed jointly is to be approved as a pharmaceutical or a medical product.

3

Future teamwork products

New product ideas are often a result of interdisciplinary communication and the creation of “innovation think tanks” where possible technologies and the market position can be analyzed freely. Communication problems can be solved through targeted networking. State-run coordination bodies could also offer targeted support to interdisciplinary undertakings and help identify new technologies.

4

Finding the right partner

Personal contacts to decision-makers are very important. The partners involved must consciously set out to create a joint cooperation and communication culture. It is not the technology scouts who have to be convinced, but the sales and marketing departments.

Public debate

The results of the workshops and survey were then presented to a wider audience and analyzed in a public panel discussion. This process complemented the views expressed in the survey with practical analyses and forceful statements from opinion leaders in both sectors.

Participants from the medical technology sector called on their biotechnology counterparts to form a precise picture of their potential cooperation partner before starting their search and to familiarize themselves with their target markets. Ultimately, companies in the medical technology sector are looking to acquire technology know-how and new customers. However, this systematic focus on the market could also stand in the way of successful cooperation. For example, if a biotech company cannot promise to supply the required quantity of a product, this would constitute clear grounds for exclusion in the eyes of many medical technology businesses. A small biotech company can, however, only supply the large industrial quan-

ties required if it receives the necessary financial support from its cooperation partner.

Further obstacles hindering cooperation were also identified. For instance, it generally takes ten to twelve years to develop a pharmaceutical product, yet a medtech company expects a return on its investment after one and a half years at most. Also, whereas biotech companies currently invest over 50% of their budget in research and development, a medical technology business invests no more than 10% of its turnover.

Based on these findings, the medical technology sector was called upon to take greater risks and, at the same time,

biotechnology entrepreneurs were warned against staying too close to researchers, something which detracts from focus on the product and market needs. Medical technology companies rejected the charge of not being revolutionary enough by citing the cost reimbursement argument. Their cautious approach results from difficulties in securing payouts from health insurance companies for completely new products.

All the participants agreed that cooperation efforts by both sectors would also be crucial for their international competitiveness.

Summary

The above-mentioned events and this survey provide us with a status report on the potential for technological and economic cooperation between two highly innovative sectors which, despite their similarities, are fundamentally different.

Medical technology is governed by the principles of engineering science. It is well-established and customer-oriented, focusing on incremental innovations geared to the market with relatively short investment horizons and traditional financial structures. Biotechnology, on the other hand, is governed by the principles of natural science. It focuses on leap innovations, thinks in long-term cycles and is supported by innovative financial instruments.

The results will provide a basis for further discussion and investigations, representing an initial step towards harnessing and realizing new synergies.

Both sectors have a positive attitude towards cooperation with each other. Technologies, markets and issues relating to the regulation of approval processes are possible areas for consideration. There is a general consensus that cooperation between medical technology and biotechnology needs to be stepped up in order to encourage innovation and consolidate their positions as key technologies.

The level of a company's interest in cooperation depends to a great extent on their respective product segments and the resultant technological and economic benefits. The fields demonstrating the greatest potential at the current time are in vitro diagnostics, cell/tissue engineering and bandages/dressings.

Many medical technology companies already use biotechnologies in their own operations. The fact that this does not apply equally to all product segments does not necessarily indicate a lack of innovative spirit. For many medical technology products and services, the opportunities for establishing links to biotechnology have been non-existent to date. Future teamwork products first need to be developed for these segments – jointly.

One key problem area is communication between medtech and biotech companies. The medical technology sector expects a lot from the biotechnology industry but does not commit itself with the necessary willingness to take risks. For its part, the

End notes

biotechnology sector does not take sufficient account of the market and product orientation of medical technology companies. Consequently, a climate of mutual understanding is required. The two sides need to start speaking the same language and to leave outdated standpoints behind.

¹ AKM, AGIT, DGBMedtechs, VDE, Situation der Medizintechnik in Deutschland im Internationalen Vergleich [The Medical Technology Situation in Germany – An International Comparison], 4 February 2005

² Spectaris, 2006 industry report (figures for 2005)

³ BVMed, 2005/2006 annual report

⁴ www.biotechnologie.de, 2006 survey of biotechnology companies (as at 31 December 2005)

⁵ For example, Paul Hartmann founded in 1867 and Fresenius in 1912

⁶ BMWI Studie, Die Medizintechnik am Standort Deutschland [Medical Technology in Germany], 2005, p. 111

⁷ Frost & Sullivan 2005, U.S. Medical Device Outlook

⁸ DIW Berlin, Die Medizintechnik am Standort Deutschland [Medical Technology in Germany], August 2005

Imprint

Publisher

BioRegio STERN Management GmbH –
Dr. Klaus Eichenberg

Capgemini Deutschland GmbH –
Marc Reinhardt

Design and project management

Dr. Ralf Emmerich –
Capgemini Deutschland GmbH

Dr. Manfred Kauer –
BioRegio STERN Management GmbH

Authors

Dr. Ralf Emmerich, Philipp Hertel –
Capgemini Deutschland GmbH

Survey

Dr. Ralf Emmerich, Philipp Hertel –
Capgemini Deutschland GmbH

Dr. Stefan Wagner –
c-quadrant

Dr. Manfred Kauer, Aysen Czurgel,
Monika Markowski, Folkert
Nommensen, Claudia Weber –
BioRegio STERN Management
GmbH

Dr. Bettina Heidenreich,
Dr. Jan Farfsing, Tanja Burkhardt,
Vera Schulte, Christian Flege –
Capgemini Deutschland GmbH

Layout

Wolfgang Breuninger,
Udo Wiechert –
Wolfgang Breuninger
Kommunikationsdesign

Editor

Anja Dowidat –
Zeeb Kommunikation

Proofreading

Maureen Dennig –
BioRegio STERN Management
GmbH

With kind support from

DGBMT DEUTSCHE GESELLSCHAFT FÜR
BIOMEDIZINISCHE TECHNIK IM VDE

ZVEI:
Elektromedizinische Technik

 **SPECTARIS**
Deutscher Industrieverband
für optische, medizinische und
mechatronische Technologien e.V.

Figures

Fig. 1	Distribution of planned cooperation in percent	3
Fig. 2	Distribution of current cooperation in percent	4
Fig. 3	Future relationship between biotech and medtech companies	7
Fig. 4	Reasons for cooperation between biotech and medtech companies	8
Fig. 5	Biotechnologies already used by medtech companies	9
Fig. 6	Areas of business in which biotechnologies are used	9
Fig. 7	Use of biotechnologies by medtech companies according to turnover	10
Fig. 8	Potential for biotechnologies at medtech companies	10
Fig. 9	Future importance of biotechnologies for various medical product segments	11
Fig. 10	Forms of cooperation between medtech and biotech sectors	12
Fig. 11	Goals achieved through cooperation within one sector and between sectors	13
Fig. 12	Factors ensuring successful cooperation	14
Fig. 13	Reasons for the failure of cooperation arrangements	15
Fig. 14	Success factors when initiating cooperation arrangements	15
Fig. 15	Obstacles encountered when initiating cooperation arrangements	16
Fig. 16	Measures facilitating cooperation	17

**BioRegio STERN
Management GmbH**

Friedrichstrasse 10
70174 Stuttgart, Germany

info@bioregio-stern.de
www.bioregio-stern.de

Phone +49-7 11-870354-0
Fax +49-7 11-870354-44

**Capgemini
Deutschland GmbH**

Löffelstrasse 44–46
70597 Stuttgart, Germany

monika.hespe@capgemini.com
www.de.capgemini.com/biotech

Phone +49-30-8 87 03-175
Fax +49-30-8 87 03-111

Stuttgart | Tübingen | Esslingen | Reutlingen | Neckar-Alb